Introduction to the Master Plan for the Chicago History Museum
"Guideposts for the Next Quarter Century"

Every effective non-profit must finds ways to balance current needs and long-term sustainability. In doing so, a master plan is a powerful tool.

The Master Plan for the Chicago History Museum looks ahead over 25 years and records key decisions, guiding principles, and goals. This is not a detailed description of all of our continuing operations or our departments, nor is this our next five-year strategic plan. Instead, the Master Plan sets forth some moves on the chessboard that we intend to make over the next generation so that we can achieve the financial, programmatic, and staffing capacity that we need. These include decisions about the future use of our facilities, as well as fundamental decisions about other elements of our organization. Some of the Master Plan's guiding principles record fundamental insights about our Museum and call for a recommitment to certain enduring principles.

The Master Plan for the Chicago History Museum was adopted by the Board of Trustees on October 22, 2014 after a long-range planning year that involved board and staff, the museum profession, and the community. We thank all of the participants, and we thank all of our communities of support.

Founded in 1856, Chicago's oldest cultural organization looks forward to sharing Chicago's stories during another quarter century of service.

T. Bondurant French, Chairman   **Gary T. Johnson, President**

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The power of an authentic visit.
- **Experiencing our collections is the heart of the visit.**
- **We will continue to welcome students, scholars, and lifetime learners to use primary sources in our Research Center, even as we also expand our online research guidance and resources.**
- **Programs, events, and rentals reveal the Museum as a place of wonder and are an integral part of our operations.**

Be a destination and a center of civic engagement.
- **Expand the outdoor footprint and enhance the Museum's visibility, but without adding a new museum building or wing. Even passersby should be able to experience the Museum as "Chicago's Place."**
- **Transform the auditorium into a multi-purpose theater that also offers film experiences; "activate" the adjoining first-floor gallery.**
- **In addition to offering new exhibitions, enliven and refresh exhibitions and galleries on an on-going basis with engaging additions and updates.**

Make meaningful connections.
- **Our brand of service is "welcoming, fun, meaningful, and social." Our brand for exhibitions is "immersive, unique, and everybody's welcome."**
- **Be present around the city.**
- **Commit to a strong social media and web presence; be a leader in bold innovations.**

Inspire students and develop teachers.
- **Use history stories and primary sources to help meet educational goals across the curriculum.**
- **Create a best-in-class school outreach program using stories to teach skills and to connect students with civic life.**
- **Offer field-trip, classroom, and tech-based learning, and search for new and dynamic ways to integrate all three.**

Connect with collections.

- Digitize our vast collection of 23 million holdings on an as-needed basis, with a fast track for high-value material for mission and revenue.
- "Paint" the town with Chicago-story virtual content, working with partners whenever possible. Periodically evaluate revenue opportunities, such as paywalls, based on offering digital-content solutions.
- Implement state-of-the-art technologies for managing and facilitating access to CHM's collections and associated digital assets, and always have in effect an on-going Master Plan for Modernizing Collection Access, Storage, and Management (see Appendix A for the current plan).

Finance and development.

- Grow the endowment over time to provide 50% of annual support, and build up reserve funds to bolster the funding of projects such as exhibitions.
- Pay off debt by the scheduled 2036 due date without planning to roll it over.
- Develop a best-in-class planned giving program, as befits a museum that was destroyed in the Great Chicago Fire but was reborn thanks to the Gilpin Fund -- a generous bequest that continues to offer annual support.

Branding, marketing, and business planning.

- Chicago is the brand. What the Museum offers are ways to share a passionate commitment to the city's past, present, and future.
- Market museum activities as something to believe in – a "cause"; be seen as an innovative social entrepreneur in service to the city.
- All museums, including our own, must seek new revenue sources to supplement and replace old ones. For our Museum, however, the key revenue driver is our ability to gain support by building loyalty. This means offering the public different ladders of engagement and constantly finding ways to move individuals up to the next level. There are lessons to be learned from experience with relevant business models, both in the business and the nonprofit sectors.

Approved by the Executive Committee 09/10/2014; approved by the Board of Trustees 10/22/2014.

Appendix A

**Master Plan for Modernizing Collection Access, Storage, and Management,
Adopted by the Chicago Historical Society's Executive Committee September 10, 2014,
and by the Board of Trustees October 22, 2014**

Access goals for the collection.
- **The Research Collection** (i.e. Library, Archives and Manuscripts, Prints and Photographs, and Architectural drawings and records): **Over time, make our Research Collection discoverable on-line and usable in person at the Museum by both scholars and the public.**
- **The Museum Collection** (i.e. Costume, Decorative and Industrial Arts, and Architectural models and fragments): **Over time, make our Museum Collection discoverable on-line and usable in person by scholars.**
- **Public viewing: Use our own collection as the major emphasis of our exhibition schedule.**

The East Basement Renovation Sequence (2016-2019).
- **Empty the East Basement and use Broadview as swing space.**
- **Renovate the East Basement and add capacity by installing compaction storage.**
- **During the East Basement Renovation Sequence, also make progress with collection reassessment and processing.**

Use of storage facilities following the completion of the East Basement Renovation Sequence.
- **Museum: The primary use for East Basement storage will be for storing the Research Collection. Storage in the Museum building itself will be essentially unchanged (mixed use).**
- **Storage facility in Broadview, Illinois: The primary use for Broadview will be for storing the Museum Collection. (A major evaluation of Broadview's future upgrades and maintenance priorities needs will take place once the East Basement Renovation Sequence has been completed.)**
- **Underground "green" storage in Harvard, Illinois: The primary use for Harvard will be for meeting cool storage and dark storage needs (estimated date - 2024). ("Dark storage" is for material that almost never will be used because digital copies are the preferred format.) We also will watch real estate market prices carefully and periodically consider the sale of unneeded acreage.**

Collection management.

- **Use "more product, less process" techniques for collection processing.**
- **Commit to careful collecting practices and rigorous ongoing collection reassessment.**
- **Implement state-of-the-art technologies for collection management and digital asset management; priorities uses include making progress on the digital catalogue conversion and on inventory work.**